RECREATION AND COMMUNITY DEVELOPMENT ON THE CANADIAN SHIELD PORTION OF SOUTHERN ONTARIO

Concepts of a Model Recreation Community

vol 1

Project
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Concepts of a Model Recreation Community

Federal/Provincial Rural Development Agreement
ARDA Project No. 25068

RECREATION AND COMMUNITY DEVELOPMENT ON THE CANADIAN SHIELD PORTION OF SOUTHERN ONTARIO

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Project
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April 17, 1970

FEDERAL/PROVINCIAL
RURAL DEVELOPMENT
AGREEMENT No. 25068

Peter Klopchic, Ph.D.
Director, Travel Research Branch
Department of Tourism & Information
185 Bloor Street East
TORONTO, Ontario

Dear Dr. Klopchic:

We are pleased to submit the findings of our study of recreational community developments in the Canadian Shield portion of Southern Ontario, the Muskoka Lakes region and the Town of Bala, commissioned by the Department of Tourism and Information, December 27, 1967.

The conclusions reached in our work for you are contained in three volumes:

Volume 1 Recreation and Community Development
–Concepts of a Model Recreation Community

Volume 2 Recreation and Community Development
–The District of Muskoka and the Town of Bala

(Draft) Official Plan of the Bala Planning Area.

Volumes 1 and 2 represent our survey of recreational communities in Ontario and throughout the world and how one community, Bala, compares with normal criteria understood by governments and their consultants today. The Draft Official Plan for the Bala Planning Area submitted to the municipality in February, 1969 recognizes opportunities and constraints that pertain and shows the way to sound future development, given established investment and leadership patterns.

These reports point to the current limitations of provincial development policies affecting change and growth of recreationally oriented communities in Ontario. These limitations are expected to be remedied by studies now in progress, such as the Tourist and Outdoor Recreation Participation Study (TORP) and regional goal planning studies. We hope that our work will contribute to the body of information from which future planning and development decisions will be taken.

Yours very truly
PROJECT PLANNING ASSOCIATES LIMITED

Macklin L. Hancock

Macklin L. Hancock
President

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PURPOSE OF THIS STUDY

The government of Ontario seeks to serve all sectors of our society and to enhance economic, social and environmental conditions on as many fronts as talents, techniques and budgets of the province permit. Communities on the Shield portions of southern Ontario are essential resources that in many cases are not functioning at operational levels acceptable to a majority of the local populations or to tourists and other visitors. Conventional remedial measures provided by legislation do not appear to be applicable and private investment sources and entrepreneurial skills are often not available in sufficient quantity to make the needed impact.

This study was undertaken through the auspices of the Departments of Tourism and Information, Agriculture (ARDA Branch) and Municipal Affairs. The Town of Bala in Muskoka District contributed financially to the study and encouraged its residents and merchants to assist the consultants in obtaining essential survey material needed to structure and to test alternative concepts of community change and development.

The first task of this work was to measure and interpret present conditions in selected shield communities and to identify potentials for effecting desirable change that are closely tied to the system of private enterprise and government participation now operative elsewhere in the province. The second and concurrent task was to determine whether standards for a 'model recreation' community would provide workable guidelines for change and improvements in Bala and other existing or future centres in the Shield. The third task required was the preparation of a draft Official Plan for the Town of Bala, incorporating information obtained in the other parts of the study where practical.

We reviewed the experience of the company and the literature on existing and developing centres, then examples of communities that appeared to be geared to serving present recreation and leisure time needs of North Americans. This was followed with interviews with government officials and entrepreneurs concerned with this fast expanding type of community development. Surveys of users and operators in the Town of Bala and its market area were undertaken in the summer of 1968 to measure the correlation between planning and economic appraisals of the area with the feelings of those most familiar with existing conditions, needs and opportunities for changing the local environment. This local information was of considerable value in structuring and in testing concepts of ideal community types.

Our search for existing prototype centres in North America that appeared to meet the objectives of the study brought us into discussions with persons in private enterprise and in government. The majority of those contacted were of the opinion that the management structure, one capable of meeting market demands, was the first development criteria. As our study progressed these opinions were varified. Our work did not provide us with the physical design parameters we had anticipated but rather with substantial evidence that operations rather than design was the critical factor in determining the success of a recreational and tourist oriented venture.

SUMMARY OF THE STUDY

The frontiers of recreation resource expansion in Southern Ontario are rapidly closing in those areas that are now accessible to tourist and cottager markets. Many existing communities within the region of our study appear to be stalemated or on the threshold of decline although theoretical market demands are increasing steadily. The following highlights of our study of the Canadian Shield portion of Southern Ontario illustrate the findings of two years of investigation and discussion with governments and users concerned with recreation and tourist facilities.

1. Our study of tourist operations indicated that management structure and financial leverage were the primary dependent variables within a set of development conditions; natural environment and facility design are secondary to operating techniques used by effective developers and operators. The lack of well defined management goals and plans, in both the public and private sectors, is the major contributing factor to present conditions on the Shield.

2. Investment capital for privately developed recreational and tourist facilities and supporting community services in the recent past has been in short supply because the overall performance of these industries on the Shield is statistically discouraging compared with large urban centres. A plan for development and improvement based on regional economic criteria and sound management programs is considered by us to be the most feasible method for altering current trends and for capturing a large share of <u>available</u> markets.

3. Successful recreational enclaves in North America and in Europe exhibit similar characteristics:

   a) they have the physical environment for providing marketable services,
   b) they all have developed accommodations and facilities that are both economic and attractive,
   c) development of these communities is either undertaken or co-ordinated by one policy making group that continues to exercise a dominant role in the operation of the completed centres.

4. Communities oriented to recreation and cottage services should be of sufficient size to provide the opportunity for full services and variety of complementary facilities. Development is most feasibly supported complementing government activities in areas that offer year round recreational use potential, where circumstance would provide for both intensive summer and winter demands plus between season use potential.

   Recreation and tourist service employment should comprise a minority portion of the total labour force in any important regional centre. A range of between 20 and 40 per cent might be determined an appropriate target, subject to further review.

   The most desirable type of tourist centre contains within one complex sufficient activity resources to attract people of diverse economic, age and educational backgrounds.

5. To achieve a more viable and balanced development of recreational and tourist facilities on the Shield, some existing communities should be encouraged to grow and assume additional functions; others to stabilize and new centres to be created as the remaining portions of the Shield are opened for development:

   a) planning studies should appraise demand and capability to meet demands on a regional basis, (T.O.R.P.),
   b) growth points should be identified, (Treasury & Economics, Regional Development Branch),
   c) priorities for allocating capital funds for regional public improvements should be established, (T. & E., R.D.B.),
   d) detailed plans and programs for each centre should be prepared, (T. & E., R.D.B. and Tourism & Information),
   e) the nature and scale of enterprises that constitute a centre should be specified in sufficient detail to illustrate how demand potential could be met, (T. & I),
   f) managerial and other operational guidelines should be part of the overall centre development specification, (T. & I),
   g) environmental planning teams should be selected to guide public investments and to stimulate through incentives and control programs, complementary public development (T.O.R.P.).

6. Topography and climate play an important role in the identification of suitable recreation centres for growth and investment. Our studies of the Muskoka District indicate that the greatest potential for year round use and consequently areas offering higher returns on public and private investment, are those above an elevation of 1,000 feet, where snow conditions and topography are suitable for skiing and snowmobiling. Most of the Muskoka lakes area lies below these elevations, only those lands east of Bracebridge, including Huntsville in the Lake of Bays are above.

The western portion of the Muskoka district receives the highest mean average snowfall of between 112 and 127". The entire district receives over 100" annual average, therefore winter activities here are more suitable than in other sections of Southern Ontario.

7. Skiing is a localized activity contained in areas served by tows and other lift devices. The motorized snow sled presents enormous opportunities and problems because of the almost unrestricted geographic limits to its use. The field of range of these vehicles three to four years ago averaged a few acres; today this has expanded to several square miles. The full impact of this recreational activity in regional economic or physical planning terms is not yet understood fully. As an activity its recent origin precludes collection of data adequate for comprehensive analysis, however preliminary studies now in process by the Department of Tourism & Information will show the current impact of this recreational vehicle in Ontario.

8. Toronto is a good tourist town because it affords a wide variety of facilities, some excellent and some inadequate. There are sufficient good hotels, good restaurants, good theatres, good night clubs to more than compensate for the ones that are not good. In resort communities such as Hilton Head, Squaw Valley and the Adirondacks, bad service, bad food, bad accommodations cannot be economically tolerated. In a smaller centre, one or two poorly run establishments can set the tone for an entire community, particularly if these are essential tourist or cottage service operations.

9. The Ontario government's guide book series provides an inventory of tourist establishments rather than a full qualitative survey. Other available guide books offered by newspapers and hotel associations are similar in scope to the provincial inventories. It is not the role of government to critically evaluate the performance of operators in the tourist industry and give merit points to those measuring up to high standards of service, quality and environment. Encouragement should be given to the creation of a private evaluation agency, representing interests other than those of the tourist industry itself.

COMPONENTS OF THE COMMUNITY MODEL

Based on our study of the factors and problems in structuring a community geared primarily to the demands of seasonal visitors, tourists and other persons who come to an area for purposes other than employment, the workable components for which provincial policy can be set to facilitate development of a satisfactory community environment area:

1. The natural environment suitable for economic development of facilities that meet market demands.
2. Management.expertise with the vision and capacity to formulate and implement.
3. Feasible and imaginative programs that provide for long term investment security.
4. Capital leverage for developing and operating.
5. An available and well trained labour force.
6. An overall regional growth concept setting the type, density and frequency of centres to be developed or expanded.

Our concept of a model recreation community takes the form of a triangulated hexagon. Each triangular segment is a dependent totality with the 'vector' lines constituting the dominant factors; the outer cords containing the action ingredient or planning tool that enables the purposeful organization of the dominant to meet or to create markets for the activities contained in the community.

Market considerations affect every dominant factor and are held external to the system. This conclusion is supported by the studies of Fine in Wisconsin and observed by us in developments in Ontario, e.g. Beaver Valley and Bigwin Island.

To expand on these factors: -

Community Centre Environment

Much has already been said in a general way about the best side conditions for communities and our findings support accepted topographic and accessibility recommendations. The significant locational factors common to most newly developed recreational oriented centres described in Appendix C are:

a) new centres tend to be inland and not on the major water body,
b) automobile access to new centres is oriented primarily to regional arterials, and
c) prime shore lands are given over to hotel and related uses high operating revenue potentials.

Old Shield towns tend to be sited along the shore, in bays and generally at points between two water levels. Commercial and industrial activities generally occupy the best lands for developing high net-yield land uses by today's market standards.

New communities bear the mark of sure goal and policy statement of purpose and design intent and the economic feasibility of development would appear to be certain from the onset.

Management

Communities on the Canadian Shield happened - model recreational communities are planned - and planned to provide a competitive rate of return to the investor. Development and operating management skills are the common factor that mark successful leisure oriented communities throughout the world. Vagaries of taste, climate and access heavily influence the markets for these communities reducing the margin for operational error to nil.

In example after example free-enterprise development succeeds when development decisions are made on the basis of knowledge and experience. Characteristically the measure of success of these new ventures is both financially and environmentally proportional to the control vested in one group or agent.

The authority of leadership must be secure and its pattern of operation, and consistent if the needs of the market are to be met. Leadership security is necessary to provide a stable environment for goal formation, long-range planning, priority identification and logical phasing of development. It is the environment of consistency that facilitates management sensitivity to changing market conditions and appraisal of alternative courses of action, goal amendments and the consequent physical adjustments needed to meet current markets. This type of management is particularly attractive to investors.

Imaginative Programs

It seems particularly important that recreational centres be thoughtfully designed and controlled. Urban design parameters that apply to the city landscape have application in modified form in the tourist-cottage centre. The sure hand of a competent physical designer is an essential participant in all development or redevelopment of cottage-tourist centres.

Programs must be supported by the environment and geared to current modes of accessibility. Topography is needed for natural ski hill conditions and extended season operations. Communities without the natural advantage of hills for winter sports development should have a diversified employment base.

Capital for Investment

For many years conventional lending institutions in North America viewed investments in recreational and tourist facilities outside major urban centres with less than enthusiasm. International agencies such as the O.E.C.D. and the World Bank have introduced the financial community to the current largeness of the recreation sector of the economy and its relative domestic and export economic importance among nations. Governments in both developed and underdeveloped countries have in the last five years directly encouraged and underwritten private tourist and recreation development.

The government of Ontario makes direct loans and grants for construction of some types of tourist facilities. ARDA and the Department of Treasury have funded recreational oriented ventures that promise to make a favourable impact on the economy of a region.

Labour Force

The high labour content of most recreational oriented commercial activities requires that a core staff of skilled workers is required to provide the level of service demanded. Our colleges of applied arts and technology are offering for the first time supervisory or middle management training in the hospitality and food service industries. These programs must be expanded and more apprentice type training and up-grading courses offered to those now employed in service industries in recreation areas.

Regional Controls & Plans

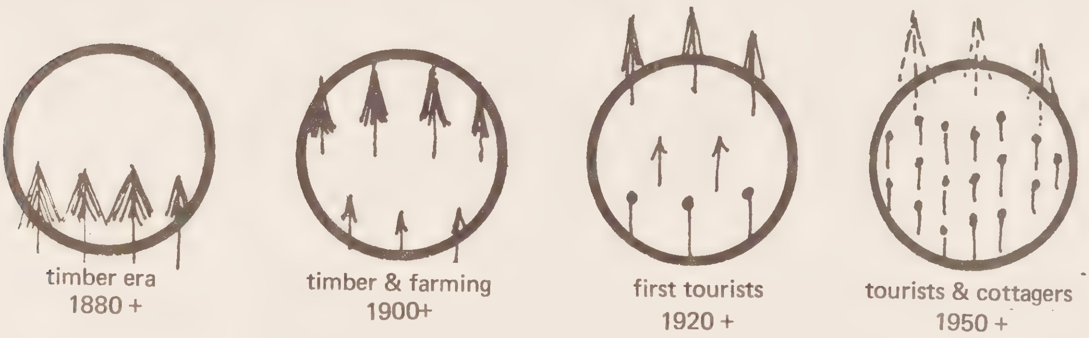
Recreational communities are dependent upon regional highway networks as well as governmental and commercial services that are only available at one place within a region. Communities that develop year round recreational attractions can support a permanent population that fulfills all key roles in its operation supplemented with outside staff during peak vacation periods. Communities that do not have the natural environment for developing year round attractions must depend upon other larger centres that provide diversified employment opportunities during the off season. Regional development priorities and planning policies are the prerequisite tools required to make this possible.

DEVELOPMENT OF COMMUNITIES ON THE SHIELD

Town settlement of southern Ontario's portion of the Canadian Shield occured in response to development techniques and marketing factors of the last century. It is the task of local residents, governments and their advisors to adapt these communities to the recreational and leisure time need of this and the next century.

Lumbering and agricultural resources coupled with existing transportation technology and accidents of terrain were stimuli that shaped the original towns on the Shield, determining their land uses, centres of commerce and trade, their institutions and landmarks.

When the forest industry declined and agriculture proved to be non-competitive with other areas the form of these communities remained but the orientation changed. Gradually throughout the early part of this century many of these communities adapted to needs of urban visitors who as tourists and cottage owners came north from the financial and industrial centres of Ontario and the north-central U.S.



The above diagram illustrates the changing character of the environment and economic base of the Shield between the earliest and latest forms of exploitation.

The change in community focus from primary employment occupations to a tertiary or service industry base came slowly and non-revolutionary for both employment types at that time were of a labour-intensive character. The seasonal visitors to the area prior to WWII as we understand were less demanding of the environment available in these communities. It must be remembered that comparative experience of most visitors and permanent inhabitants at this time was limited mainly to what could be seen elsewhere in North America and probably restricted to north-central portions of the continent only.

Up to the 1940's the Shield portion of Southern Ontario was a seemingly adequate multiple-activity area strongly becoming a major continental recreational area. Local developments here were dictated by the insites of individual entreprenaurs to capture as much of the seasonal recreational market as they could. Government involvement to this time was geared to opening northern lands for settlement and forest management.

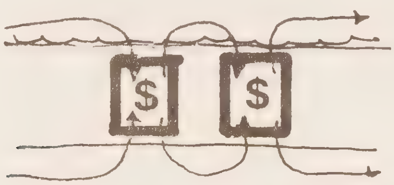
Community interest and development incentive was found primarily in those who were permanently in residence. The muscle behind municipal action was proportional to the amount of capital leverage generated by local property and business assessments. The problem of matching day to day operational costs with revenues received from local property and business assessment was a continual community activity, and speculation on the future tended to be a task easily put aside.

The Second World War showed Canadians, Europe and the Far East and opened new windows for them. Transportation technologies and communication by-products of the war, were translated into civilian uses that expanded our appreciation of our own resources and also those of other places and cultures and we suddenly found the comfortable means for participating in them. Even as Highway 400 was being pushed northward into the heart of recreational Ontario, many people had developed a feeling that 'summers in Muskoka' were no longer enough.

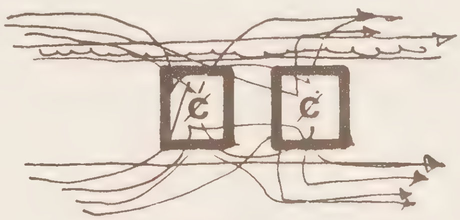
Something akin to decay of this choice recreational environment was noticed in the late 1950's. People began to sense that the environments of many tourist and cottage service centres were less rustic and rugged out-of-doors but rather more slap-dash and unnecessarily inconvenient.

Rising disenchantment was aided by a new technology that permitted people to bring familiar amenities with them from the city to the cottage. This occured to substantial detriment of the local shopkeeper who found that his biggest competitor for cottager sales was the family station wagon filled with city purchases destined for the cottage fridge, freezer or boat house.

Cottage construction increased and the number of ownership transfers were also high. Local goodwill trade built up over the years became an increasingly less dependable portion of cottage service centre trading.



earlier cottager spending patterns



current cottager spending patterns

The resort owner or tourist cabin operator found that he was competing with both hotels abroad and the manufacturers of tents and camping trailers that had become mobile 'homes'.

Perceptive residents note that today the rate of decline in the economic life of the community is inversely proportional to the number of visitors to and through the centre. Governments too are noticing that these conditions parallel , to a remarkable extent, declining housing, shopping and transportation conditions seen in the central city. It is also evident to government and others that existing mechanism for assisting small municipalities in developing remedial studies and projects could not be applied on the Shield because essential local matching funds are inadequate for renewal programs.

Existing Settlement Patterns

By 1874 when Lord and Lady Dufferin described the beauty of the Muskoka River to the world, the Muskoka area was already becoming known as the playground of the wealthy from Toronto and the northern United States and numerous summer cottages were built after the railroad was pushed through the region. This period of cottage development lasted until WWI. By the turn of the century, cottage development on the Muskoka Lakes rivalled the Thousand Island area of the St. Lawrence River.

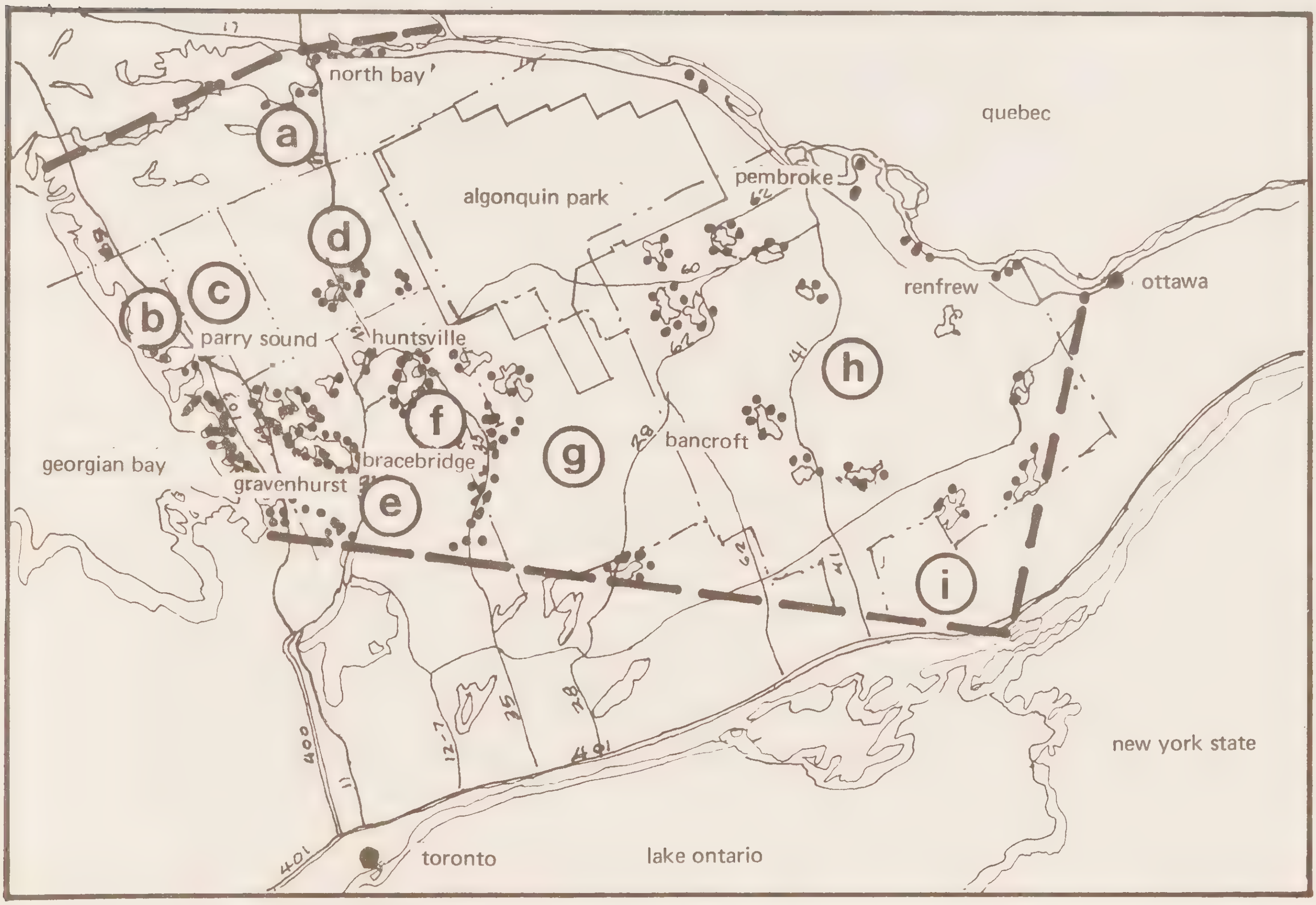
Summer cottage and resort settlement patterns reflect the transportation system existing at the time of development. The lake steamer and the railroad shaped the early forms, the automobile and the motor boat today's forms. Original cottage centres made accessible by the steamboat and railroad were generally fully developed by the 1930's. The automobile became the primary mode of transportation in the 30's and 40's resulting in a greatly altered pattern.

Provincial land settlement and road development policies, particularly after World War II, were geared to satisfying demands for cottages and a greatly dispersed pattern of recreationally oriented settlement resulted. Cottage owners using private means of transport were less dependent on the older service communities for seasonal goods and personal service. The older centres remained attractive so long as there were not too many people, boats and cars to produce congestion. Since World War II there has been an influx of cottagers, tripling in number from 1951 to 1967, a change in the primary mode of transportation from train to automobile, and the introduction of the multi-boat family due to the popularity of the outboard motor. These have contributed to congestion by creating demands which the centres' facilities could not handle.

Coincidentally, the declining hotels and resorts began to attract clientelle who were not compatible with the cottage residents. As a result, cottagers stopped patronage of local restaurants and entertainment facilities. When the resort base withered and nothing new was attracted as a replacement, cottage service remained the primary commercial activity in many centres. The effect of the transition is apparent from the number of dance halls, coffee shops and short-order restaurants that have gone out of business.

The Province in its 1964 recreation survey estimated that the Study Area attracted approximately 2,000,000 visitors during the summer season. These are roughly divided - 10% to cottage activities, 35% campers in provincial parks, 40% day trippers to provincial parks and 15% visitors to commercial resorts.

The following diagram shows the approximate distribution of the estimated 50,000 cottages in the Study Area. The survey was limited to those cottages with Hydro connections.



The above diagram is schematic but adequately illustrates the concentration of cottages in the western half of the Study Area. The following table shows the number of cottages reported in each Provincial Resort Area in 1964.

a)	French River & Lake Nipissing	2,000 *
b)	30,000 Islands of Georgian Bay	8,280
c)	Parry Sound west	1,400
d)	Parry Sound east	4,215
e)	Muskoka	9,020
f)	Lake of Bays	2,900
g)	Haliburton	12,200
h)	Lakeland of Renfrew	8,220
i)	Rideau Lakes	1,500 *
		49,735

* factored by consultant

Populations of Shield Communities

The Study Area contains 172 reporting census units within the counties and districts of Parry Sound, Muskoka, Haliburton, Renfrew and Lanark and in parts of eight others. This portion of Ontario has not received population increases approaching the gains that have been made to the south and east. Table I indicates the relative gain or loss of population by type of jurisdiction recorded between 1911 and 1966. Table II shows the net population change that occured.

A declining majority of the total permanent population in the Study Area is still situated in rural and unincorporated territory. It is in these regions that the heavy concentrations of cottages and resorts occur. It is a considered guess that the populations of these rural places increases by a factor of four during the summer peak.

Only 14 towns and cities in the Study Area have a population base sufficiently large to begin to support a diversified economy and only nine of these measure up to the Department of Municipal Affairs criteria of 5,000 population for full services and facilities. Nine of the fourteen larger centres are situated in the eastern half of the Study Area. Most of these towns have some agriculture and all have lumbering and forest product employment. North Bay in the western half of the Study Area is a regional distribution centre and a significant amount of agriculture employment is reported in the surrounding rural areas.

In the summary tabulation on Table II the relative growth rates of the three types of jurisdiction are compared. The study Area sustained an average annual increase of one percent between 1911 and 1951, after that time the rate decreased to .6 percent. The most noticeable decreases occured in the larger towns and in the townships.

TABLE I RELATIVE POPULATION CHANGE 1911 to 1966

	Towns			Villages			Reporting Townships		
	Units	Gain	Loss	Units	Gain	Loss	Units	Gain	Loss
1. Parry Sound	4	3	1	4	3	1	19	4	15
2. Nipissing (part)	2	2	-	-	-	-	6	4	2
3. Renfrew	4	4	-	8	8	-	25	9	16
4. Muskoka	4	4	-	3	3	-	20	11	9
5. Haliburton	-	-	-	-	-	-	10	3	7
6. Hastings (part)	-	-	-	4	3	1	16	3	13
7. Lennox & Addington (part)	-	-	-	-	-	-	4	1	3
8. Frontenac (part)	-	-	-	-	-	-	11	2	9
9. Lanark	4	4	-	1	1	-	13	2	11
10. Simcoe (part)	-	-	-	-	-	-	1	-	1
11. Ontario (part)	-	-	-	-	-	-	1	-	1
12. Victoria (part)	-	-	-	-	-	-	3	-	3
13. Peterborough (part)	-	-	-	-	-	-	5	1	4
Study Area Total	18	17	1	20	18	2	134	40	94

Source: 1967 - Ontario Population Statistics,
Dept. of Municipal Affairs

TABLE II POPULATION CHANGE - TOWNS & VILLAGES

		1911	1951	1966
	Kearney	812	399	316
	Parry Sound	3,429	5,183	5,901
	Powassan	644	832	1,071
	Trout Creek	0	389	520
Parry Sound	Burks Falls	976	891	864
	Magnetawan	0	197	192
	Rosseau	0	215	231
	South River	593	943	939
	Sundridge	420	634	714
	19 Twps.	19,673	17,688	17,605
	North Bay	7,737	17,944	23,635
Nipissing	Bonfield	484	570	577
	Mattawa	1,524	3,097	3,143
	6 Twps.	4,608	6,554	11,876
	Arnprior	4,405	4,381	5,693
	Deep River	0	0	5,513
	Pembroke	5,626	12,704	16,262
	Renfrew	3,846	7,360	9,502
Renfrew	Barry Bay	0	1,218	1,388
	Beachbury	0	0	531
	Braeside	0	540	530
	Chalk River	0	0	1,086
	Cobden	762	831	902
	Eganville	1,189	1,326	1,478
	Killaloe Stn.	435	762	825
	25 Twps.	35,593	57,595	45,683
	Bala	0	422	489
	Bracebridge	2,776	2,684	3,045
	Gravenhurst	1,624	3,005	3,257
	Huntsville	2,358	3,286	3,342
Muskoka	Port Carling	378	493	573
	Windermere	0	153	122
	Port Sydney	0	181	212
	20 Twps.	14,097	14,489	16,651
	Bancroft	625	1,334	2,152
	Eldorado	0	283	185
Hastings	Madoc	1,058	1,240	1,385
	Marmora	866	1,117	1,331
	Tweed	1,368	1,562	1,747
	16 Twps.	20,156	16,585	13,989

TABLE II (cont)

		1911	1951	1966
Lanark	Smiths Falls	6,370	8,441	9,876
	Almonte	2,452	2,672	3,556
	Carleton Place	3,621	4,305	4,819
	Perth	3,588	5,034	5,559
	Lanark	737	791	957
	13 Twps.	17,607	14,358	16,445
Lennox & Addington	4 Twps.	4,441	3,984	3,532
Frontenac	11 Twps.	14,592	12,107	13,608
Simcoe	1 Twp.	459	397	342
Victoria	3 Twps.	1,824	1,109	1,114
Ontario	1 Twp.	1,588	797	956
Peterborough	5 Twps.	5,915	5,052	5,253
Haliburton	10 Twps.	6,320	7,670	7,768

SUMMARY OF POPULATION CHANGE

	1911	Annual % inc.	1951	Annual % inc.	1966
Towns Over 2,000 (14)	49,981	3.9	81,030	2.6	102,270
Towns & Villages under 2,000 (24)	10,722	1.1	15,989	1.3	19,111
Townships (134)	146,873	.2	158,390	.1	154,772
Study Area Population	207,576	1.0	255,409	.6	276,153

Source: 1967 - Ontario Population Statistics,
Dept. of Municipal Affairs

Future Development of Study Area Communities

Several factors are evident that will affect cottage and resort development in the Shield, during the coming years. The 1970's will likely generate more non-water oriented winter and summer outdoor activities demand. Special year-round resorts and winterized cottages with full services will follow, increasing the employment base of the service and retail activities.

Skiing was the first activity to attract off-season use to cottages. The 4-month winter season, twice as long as the high summer season and equipment for producing artificial snow, skiing becomes of equal or greater significance than the 2 months of water oriented summer activities. The ownership of motorized snow sleds has doubled in the last year (contributing heavily to increased winter recreation). This vehicle offers a new unique dimension in recreation by providing the unrestricted open movement of the foot traveller at speeds comparable to boating and driving for pleasure.

It is projected that skidoos will equal motor boats in terms of popularity. The number being used in Ontario during the winter of 1968-69 is estimated at 72,000, compared with 38,000 one year previous.

The impact of the skidoo on the cottage areas appears to vary at the present as an inverse function of distance from Toronto, and directly to the level of facilities available in the area. Areas more than one hours drive from Toronto have attracted the skidoo enthusiast to resorts or cottages in communities with first rate accommodation and restaurant facilities.

Cottage owners, it is observed by resort operators, prior to the purchase of skidoos and winterizing tend to stay in a motel or resort and rent a skidoo to visit their cottage during the day. Even where cottages are properly winterized it is often more desirable to eat in a restaurant than to stock the cottage for a 2-day holiday.

Although the impact of the skidoo is of recent origin and the long-term economic effect on cottage-resort areas is not tested, it is nevertheless an important trend activity which could alter the recreational patterns of people in the same manner as the outboard motor, or the ski lift.

Resorts built or expanded to take advantage of improved operating economies made possible by a second 4-month season in the winter are also developing more recreation facilities, such as golf courses, indoor swimming pools, health clubs, etc., to attract guests during "between seasons" periods. To help finance capital investments many resort complexes are marketing serviced lots, condominium row houses or apartments. In doing so these operators assure themselves a broader market base of the facilities and services offered by the resort. In some instances it was noted that the initial sales transaction included a management agreement permitting the privately owned unit to be contracted to the resort as a rental unit, when not occupied by the owner, thus financially helping to defray the cost of ownership and usage to both parties.

The linking of condominium-type resort developments offering different recreation environments has just come into operation. Under special agreements, an owner of a unit in one development obtains special membership privileges in other developments, i.e. a person owning a unit in Muskoka might use his ownership privileges to occupy a unit in the Caribbean or Florida for a few weeks during the winter.

Club Mediteraanee offers the Frenchman (500,000 members) high standard winter or summer vacations at modest prices. A member is offered a prepriced vacation which is essentially unstructured in program, related to the natural advantages of the terrain. Good food, accommodation, sun and water appear to be the common ingredients that make this private club an outstanding success.

Ventures into provision of "mass" recreation have been attempted in North America going back as far as the early 1800's. These generally have tended to be fraternal and oten paternalistic in aspect - church camps, company and union resorts and the like. Although there is no substantial demand data to support a case for a Club Mediteraanee-type operation in Canada or in Ontario, we feel that this could become an important recreational trend influencing development in the Shield area, particularly where year-round activity potentials exist.

There are three main types of recreation centres characteristic to the Shield:

a) Industrial or central place service community servicing:-

i) neighbouring recreation area:- i.e.
Bracebridge
Gravenhurst

ii) integrated recreation areas:- i.e.
Kenora
Huntsville
Parry Sound

b) Cottage service resort centre:- i.e. Bala

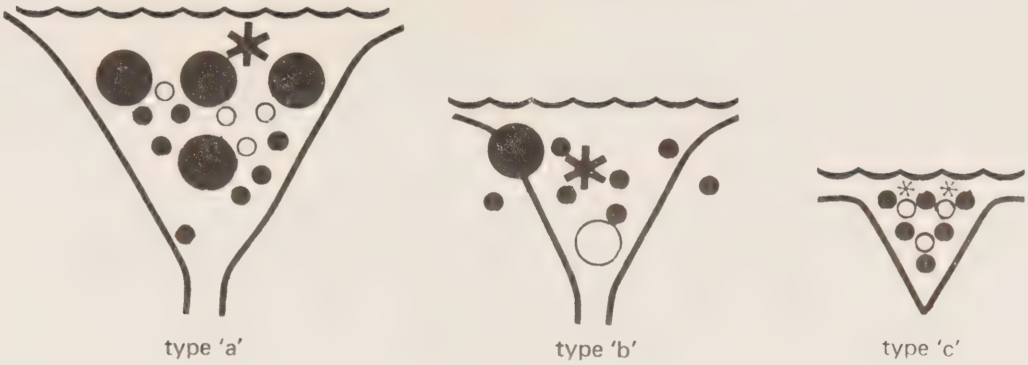
c) Cottage service resort centre as part of new area by private enterprise and/or government:- i.e. Bigwin Island

The type a) communities are potentially the healthiest form of centre within our present municipal tax system and factors of seasonal recreation usage. These communities are attractive to industry because of the amenities available to employees and management and to recreation development because of the pool of potential seasonal workers from housewives, students, etc. The type a) i) communities support some commercial and wholesaling businesses serving adjacent recreation facilities and recreationists but only the a) ii) communities can potentially develop a comprehensive resort environment within the community since they have populations and the physical assets which attract recreation development and recreationists.

Type a) centres have one major advantage over type b) and c) centres, in that the broader employment base provides an atmosphere of security for local residents which tends to maintain a stable and better trained labour force.

The type b) centres tend to be small in population and natural advantages, usually heavily dependent on a recreational employment base. These communities are also dependent upon larger centres (of type a) for many essential services and for off-season employment.

Type c) centres are the only ones being built at present, since only in a new area can the developer, government agency or private enterprise, recover sufficient of his costs in providing the central facility and infrastructure from the appreciation in value of adjacent real estate which returns to the developer through the sale or rental of land.



The future of existing communities in the Study Area will be shaped by exercise of one of the following options:

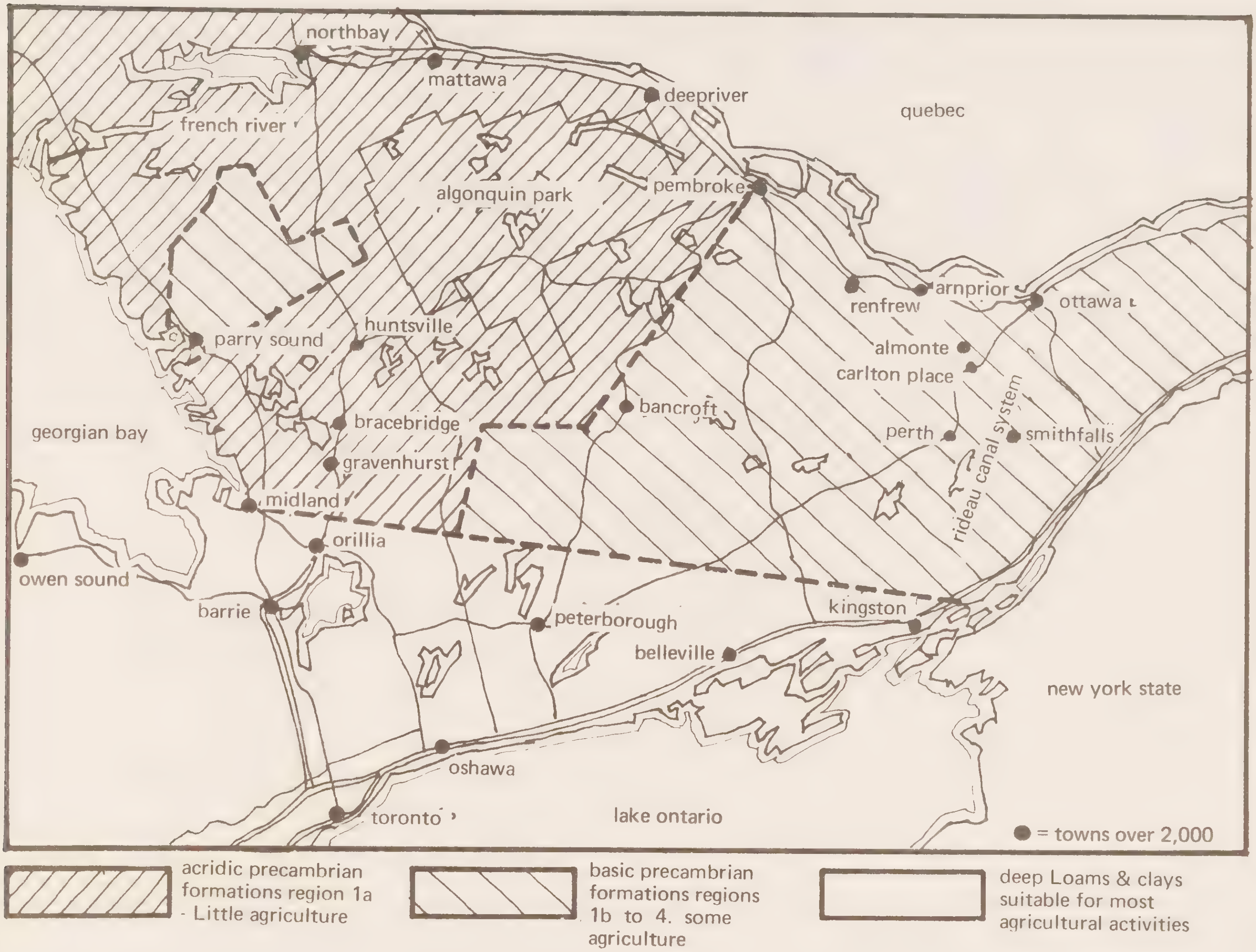
1) No change
2) The centralization of community leadership to bring the best talents to bear upon matters of finance, marketing, physical amenity and performance.
3) Infusion of new economic life by development of other regional employment opportunities between existing cottage-tourist centres, relegating these centres to the role of dormitory satellite.

The status quo option would maintain Shield communities at current levels of development but the relative standards of living and levels of improvement would in all probability decline. Planned recreational communities of the type described as 'c' will become more common within the remaining years of this century. Services offered in existing communities today would not fare well under the new competition.

Negative restrictions such as Official Plans and Zoning Bylaws do not provide a platform for creative development. Existing communities will need the same assistance in the form of full planning and economic services that are part of the developer's package as he prepares for investment in a new recreational community.

PHYSIOGRAPHY OF THE PRECAMBRIAN SHIELD

The area of the Precambrian Shield which is the subject of this study is that lying south of the French River, east of Georgian Bay and west of the Ottawa River and the Rideau Canal system. The southern boundary of the Shield in this area runs generally south-east from Sturgeon Bay to Georgian Bay north of Lake Couchiching, the Kawartha Lakes and Highway 401 until it meets the St. Lawrence River east of Kingston.

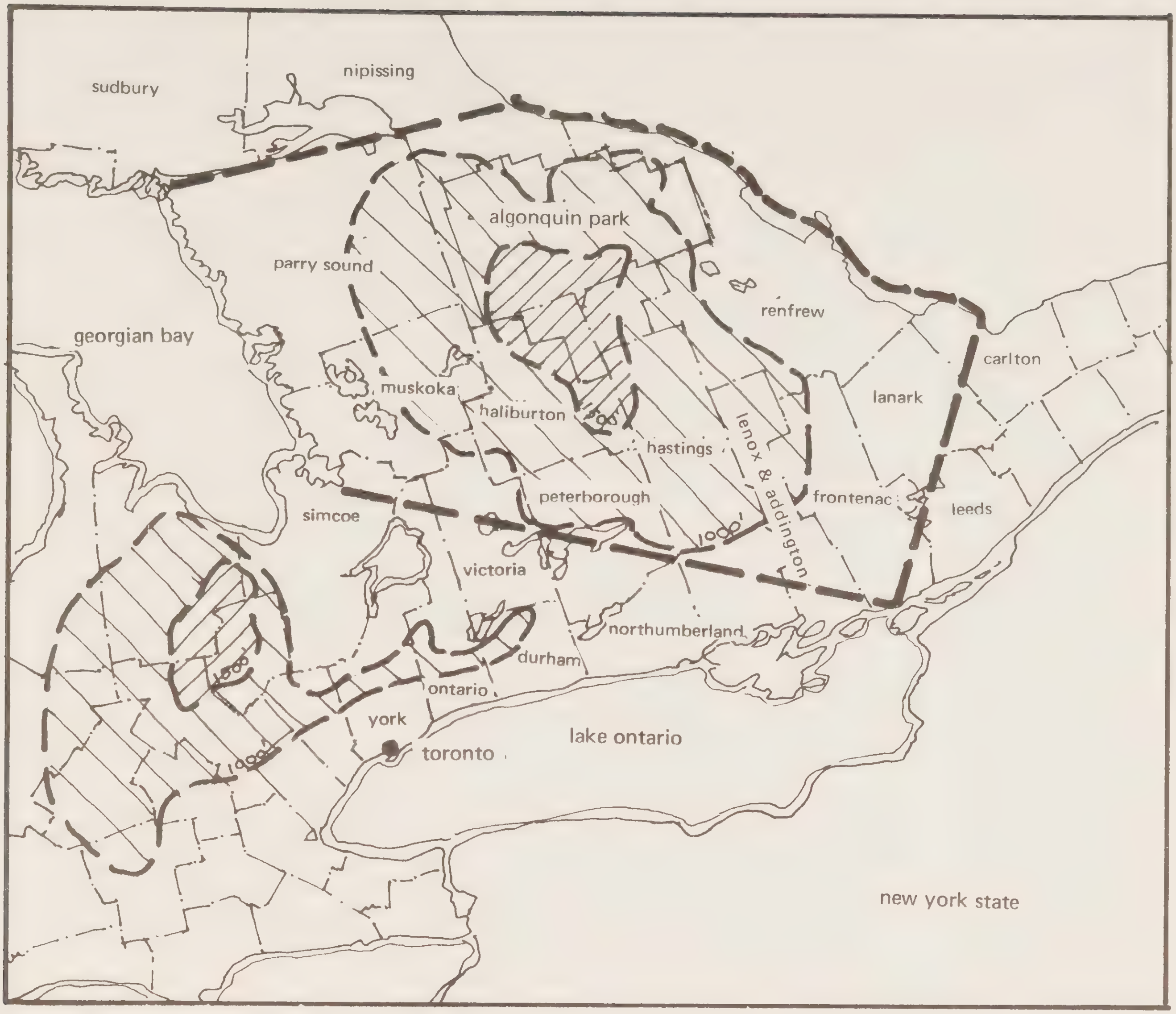


The above diagram generalizes the surface characteristics of the shield. The eastern half of the study area, generally east of a line drawn between Pembroke and Bancroft, is more suitable for limited agriculture. The western half offers little prospect of commercial agriculture development. Farming operations west of Bancroft have proved to be uneconomic except in isolated pockets of clayey-loam, notable that found in a narrow strip north of Gravenhurst to Burk's Falls. An area of sandy loam also occurs in the Gooderham-Tory Hill district of Haliburton.

The western half of the shield contains the greatest number of lakes although many sizeable water bodies occur in the east. It is estimated that there are more than 15,000 lakes in the study area, more than 4,000 of these within the limits of Algonquin Park. Two-thirds of the remaining lie within the western half of the study area.

The shield is forested with second growth stands of pine, spruce, birch, poplar, cedar, tamarack, hemlock, maple and oak. Much of the forest cover is of some commercial quality. It has been reported that the forests of Algonquin Park alone contribute to the direct employment of 3,200 persons, however the census of 1961 indicates that in the thirteen counties, - hunting, trapping, fishing and logging and related accounted for only 1,930 persons in the total labour force.

The generalized topography of the Study Area is shown on the diagram below. The two significant contour lines indicated on this drawing contain the region felt to be most suitable for winter sports activities. Although there are many exceptions, the potential of encountering suitable natural ski slopes of between 250 and 400 feet of drop are substantially greater above the 1,000 foot contour than below. The probability of natural snow is also greater here. Recorded snow accumulation is greatest adjacent to Georgian Bay where 100"or more may be expected to fall annually.



sudbury
nipissing
algonquin park
parry sound
renfrew
georgian bay
carlton
muskoka
lanark
haliburton
hastings
lenox & addington
simcoe
peterborough
frontenac
leeds
victoria
northumberland
durham
ontario
york
toronto
lake ontario
new york state

APPENDICES

APPENDIX A

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APPENDIX B

SURVEY OF LITERATURE

Research phase began with a review of the following bibliographical references:

1. Munro, Neil and Duncan Anderson, An Initial Bibliography on Outdoor Recreational Studies in Canada with Selected United States References, Canada Department of Forestry and Rural Development, Ontario,November, 1967.

2. Roy I. Wolfe, "Perspective on Outdoor Recreation: A Bibliographic Survey", The Geographical Review, Vol. LIV, No. 2, New York, 1964. P. 203-238.

3. Outdoor Recreation Research, U.S. Department of the Interior, Bureau of Outdoor Recreation, Washington, D.C., 1966.

4. Index of Selected Outdoor Recreation Literature, U.S. Department of the Interior, Bureau of Outdoor Recreation, Washington, D.C., 1967. Vols. I and III.

5. Arthur D. Little, Inc., Tourism and Recreation: A State of the Art Study, U.S. Department of Commerce, Washington, D.C., 1967.

Existing sources of information most useful in our Study included the following studies:

1. B.E. Southworth, "An Optimal Planning Model for Outdoor Recreational Development in a Rhode Island Community", Masters Thesis, University of Rhode Island, 1964.

   This study examined the attitudes of an established New England seashore community toward a proposed development of recreation facilities catering to: 1) tourists, or 2) day users. The economics of each alternative were illustrated before the attitudes of permanent residents were tested:

   1. to establish a ranking response from favourable to unfavourable toward each type of development;

   2. to measure the intensity of feeling toward each proposal based on the economic and social background of respondents;

   3. to determine decidedness of respondents; and

   4. to measure the involvement of the respondent, i.e. his opinion based on his values or those he believed were held by others.

The supposition that residents would accept development servicing the tourist trade and would oppose day-user facilities was confirmed.

2. Fine, I.V. and Roy E. Tutle, "Tourist Overnight Accommodation Industry in Wisconsin", Vol. 2, No. 6, Wisconsin, Commerce Papers, Madison, 1963.

The following data on tourist establishments are located in the northeast and northwest or Precambrian Shield portion of the state:

a) Type of tourist establishment as a percentage to total number:

	N.W. (Shield Area)	N.E.
Resorts	77.7%	80.7%
Motels	12.1	8.1
Other	10.2	11.2
	100.0%	100.0%

b) Study of profitability of establishments indicated that 17 rental accommodation units were the minimum viable size per resort or motel.

c) Auxilliary operations associated with resorts or motels as a percentage of occurrence were:

	N.W. (Shield Area)	N. E.	State Average
Boat or Motor Rental	79.6%	86.2%	62.1%
Bar or Tavern	29.8	28.6	25.6
Restaurant	20.6	22.9	23.8
Grocery Store	9.4	5.4	5.0
Sporting Goods	13.1	5.9	6.4
Gift Shop	11.9	7.7	7.4

d) 58% of all accommodation establishments drew 90% or more gross revenue from room rental

e) Tourist attractions to Wisconsin hotel and resort guests reported by operators:

	N. E.	N. W.	State
Fishing	81.4%	76.8%	63.2%
Swimming & Boating	45.5	59.7	50.3
Scenery	15.9	19.0	17.9
Accommodations	12.8	12.8	13.1
Hunting	10.5	8.4	6.9
Food	3.6	4.2	4.6
Other Sports	3.0	7.0	8.4
Commercial Attractions	0.5	0.6	5.2
Historic Sites	0.7	0.6	1.8

Percentages total more than 100% because many respondents indicated more than one attraction.

3. "The Economic Impact of Recreation" - Wisconsin Development Series, Wisconsin Department of Resource Development, Madison, 1965.

Data extracted primarily for Washburn County which is Shield-like in character.

a) Retail sales applicable to recreation spending as a percentage of total retail sales for Washburn County:

Type of Establishment	Estimated Recreational Retail Sales	Recreation Sales as a % of Total Sales	% of Sales Dollar Attributed to Wages	Wages Attributed to Recreation Sales
	$	%	%	$
Automotive & Gas	1,850,000	26.8	19.5	360,000
Grocery or Supermarket	700,000	23.4	9.9	695,000
Eating & Drinking	520,000	32.2	28.0	146,000
General Merchandise	270,000	39.5	20.7	56,000
Drugs	150,000	27.6	16.7	25,000
Apparel	80,000	22.9	21.3	17,000
Lumber, Hardware & Building	70,000	5.1	13.5	9,500
Furniture & Appliances	40,000	38.5	15.7	6,300
Other	570,000	38.9	17.8	101,500

b) A study of resort and motel operations indicated that wages account for 40% of gross receipts.

4. Fine, I.V, and E.E. Werner, "Private Cottages in Wisconsin", 1959, Wisconsin Vacation-Recreation Papers, Vol. I, No. 4, University of Wisconsin, Madison, 1960.

a) Survey of Wisconsin cottage usage by months during 1959 (sample of 1,786 cottages - 1,173 Wisconsin residents; 613 non-residents):

	Wisconsin Resident		Non-Wisconsin Resident	
Month	No. Used	%	No. Used	%
January	130	11.1	34	5.6
February	119	10.1	33	5.5
March	181	15.4	62	10.2
April	494	42.0	189	31.0
May	886	75.3	391	64.1
June	1,103	93.8	497	81.5
July	1,156	98.3	568	93.1
August	1,141	97.0	560	91.8
September	1,046	88.9	481	78.9
October	721	61.3	312	51.1
November	407	34.6	98	16.1
December	158	13.4	49	8.0

NOTE: The high percentage of usage in the month of June is due to the nine-month school year in the United States.

b) Expenditures made in Wisconsin by cottage users in connection with cottage use during 1959:

Expenditure Category	State Resident Cottage Average		Non-resident Cottage Average	
		%		%
Purchased Meals	$ 54.	4.2	$ 87.	5.7
Groceries & Meat	231.	18.1	290.	19.0
Fishing Licenses, Equipment, etc.	21.	1.6	32.	2.1
Boat Rentals	2.	0.1	4.	0.3
Transportation	114.	8.9	117.	7.7
Amusements	67.	5.2	81.	5.3
Clothing	37.	2.8	78.	5.1
All Other Expenditures	53.	4.1	64.	4.2
Unclassified Expenditures	27.	2.1	14.	0.9
Boats, Trailers, etc.	185.	14.5	114.	7.5
Insurance	42.	3.3	50.	3.3
Real Estate Taxes	103.	8.1	110.	7.2
Maintenance & Improvements	345.	27.0	484.	31.7
Total Expenditures	$1,281.	100.0	$1,525.	100.0

c) Annual income of Wisconsin cottage users in 1959:

	Resident	Non-resident
Less than $3,000	7.7%	5.9%
$3,000-$4,999	13.6	8.3
$5,00Q-$5,999	13.4	9.5
$6,000-$6,999	12.5	9.2
$7,000-$9,999	21.4	22.1
$10,000-$14,000	13.6	19.5
$15,000+	15.8	20.2
Non-residents	2.0	5.3
	100.0%	100.0%
Median Income 1959 $'s	$7,300	$ 9,000
Estimated 1968 $'s (22.5% inflation)	$8,943	$11,000

5. Sno-Engineering Inc., "The Skier Market North-east North America", Area Redevelopment Admin., 1962-63.

a) U.S. and Canada

Terrain Preference	% all Skiers	as a % of users skiing 20 or more days per season
Steep slope	20.3	27.7
Steep or moderate	28.9	34.0
Moderate only	45.8	36.5
Beginner's slope	4.2	1.0

b) Conclusions: moderate slope necessary for majority of all ski facilities. Shield Area is theoretically suited for skiing preferred by north-east North America.

c) Weekend skiers spend average $18.06 per day.

d) Vacation skiers spend average $16.78 per day.

e) Average vacation 6.2 days skiing.

f) Skiers average 12.7 days per year skiing.

g) 50.7% skiers stay overnight on ski trip.

h) 67.7% skiers from family groups where 2 or more ski.

6. Federal Reserve Bank of Boston, "Ski Lift Business in New England", Research Report No. 11, 1960.

A ski-lift operation alone is not profitable but often built as a loss-leader to enhance business activity, in adjacent community and often viewed as a hobby activity.

Financial Data:

- Average amortization period seen as 20 years.
- No consistent records of operating profit in lift operations.
- Operating income range is 14% - 40$ of fixed assets.
- Long-term debt generally less than 50% of invested capital.
- Advertising accounts for 6.6-9.8% of operating revenues.

7. Project Planning Associates Limited, "Caribbean Pre-Investment Survey", Toronto, October, 1967.

The number of non-hotel commercial establishments related to hotel beds in an area is inversely proportioned to the distance between hotels, e.g. Montego Bay, Jamaica with 2,600 hotel units, closely grouped, has a night-club to hotel-unit ratio 3 times greater than that of Ocho Rios with 2,200 hotel units spaced along a 25-mile shoreline.

8. Bureau of Outdoor Recreation, U.S. Department of the Interior "1965 Survey of Outdoor Recreation Activities", Washington, D.C., October, 1967.

a) Average distance from home to <u>major</u> vacation destination in U.S. is 555 miles.

b) Average distance from home to overnight-trip destination was 111 miles; medium distance was 74 miles.

c) Average travel time for a day-trip was 1 hour - home to destination.

d) Volume of Participation in Selected Outdoor Recreation Activities by Persons 12 years of Age and Older, Summer 1960 and Summer 1965; U.S. Totals:

Activity	1965	1960	1960-1965 Change	(%)
	(million activity days)			
Walking for pleasure	1,031	566	464	(82)
Swimming	970	672	298	(44)
Driving for pleasure	940	872	68	(8)
Playing outdoor games or sports	929	474	455	(96)
Bicycling	466	228	239	(105)
Sightseeing	457	287	170	(59)
Picnicking	451	279	172	(62)
Fishing	322	260	62	(24)
Attending outdoor sports events	246	172	74	(43)
Boating	220	159	61	(38)

Activity	1965	1960	1960-1965 Change	(%)
Nature walks	117	98	19	(19)
Camping	97	60	37	(62)
Horseback riding	77	55	22	(40)
Water skiing	56	39	17	(44)
Hiking	50	34	16	(47)
Attending outdoor concerts, plays	47	27	20	(74)
Sailing	26	13	13	(100)
Canoeing	19	18	1	(6)
Wildlife and bird photography	17	-	-	-
Bird watching	13	-	-	-
Mountain climbing	4	5	-1	(-20)
Ice skating	-	69	-	-
Skiing	-	9	-	-
Sledding	-	58	-	-
Hunting	-	96	-	-

e) Favourite Activities, by Season, U.S. Totals:

Summer

Activity	%
TOTAL	100%
Swimming	32
Fishing	18
Picnics	6
Golf	5
Playing outdoor games or sports	4
Playing baseball	4
Camping	4
Gardening	4
Watching baseball	3
Horseback riding	2
Other boating	2
Water skiing	2
Walking for pleasure	2
Driving for pleasure	2
Sightseeing	2
Hunting	1
Attending outdoor sports events	1
Tennis	1
Playing football	1
Playing basketball	1
Watching auto races	1
Working at home	1
Other	1

Fall

Activity	%
TOTAL	100%
Hunting	23
Attending outdoor sports events	14
Playing football	10
Walking for pleasure	8
Fishing	7
Playing outdoor games or sports	4
Driving for pleasure	4
Sightseeing	4
Golf	4
Hiking	3
Bicycling	2
Horseback riding	2
Camping	2
Picnics	2
Swimming	1
Tennis	1
Playing baseball	1
Playing basketball	1
Watching baseball	1
Gardening	1
Working at home	1
Nature walks	1
Ice skating	1
Other	2

Winter		Spring	
TOTAL	100%	TOTAL	100%
Ice skating	25	Fishing	21
Hunting	16	Gardening	11
Sledding	15	Playing outdoor games or sports	8
Skiing	12	Golf	7
Fishing	6	Walking for pleasure	7
Snow play	5	Watching baseball	6
Walking for pleasure	4	Playing baseball	5
Attending outdoor sports events	2	Driving for pleasure	4
Golf	2	Swimming	3
Playing basketball	2	Sightseeing	3
Playing outdoor games or sports	2	Tennis	3
Driving for pleasure	1	Picnics	3
Sightseeing	1	Bicycling	2
Playing football	1	Horseback riding	2
Other	6	Camping	2
		Playing basketball	2
		Working at home	2
		Nature walks	2
		Boating	1
		Attending outdoor sports events	1
		Hiking	1
		Other	4

9. Hays B. Gamble, "Community Income from Outdoor Recreation" Paper to Maryland Governors Recreation Conference, Ocean City Md., May, 1965.

a) Derived economic multipliers for recreational $1 spent in Sullivan, Pennsylvania by:

	Multipliers
Hunters	1.56
Tourist	1.58
Cottager	1.62

b) Derived economic multipliers for selected expenditures in Sullivan, Pennsylvania by:

	Multipliers
Gas Station	1.31
Restaurant	1.93
Local taxes	2.19

10. Robert R. Nathan Associates Inc., and Resource Planning Associates, "Recreation as an Industry: Report #2" prepared for the Appalachian Regional Commission, Washington, D.C., 1966.

a) Economic multiplier of recreation industry in Appalachian estimated to range from 1.67 in sparsely populated areas, to 2.21 in populous counties where recirculation could be kept within borders.

b) The seasonal nature of recreation is reflected in irregularity of employment that limits annual earnings and tends to attract workers from the fringes of the labour force. Evidence of the success of many segments of the industry in lengthening the season (skiing, winter vacations, weekending, etc.), has yet to produce significant changes in the seasonal character of the industry. The case studies show that two-month summer season is no longer the standard, but few "seasons" extend beyond six months.

c) Because recreation alone seldom provides a base for a viable economy even when recreation potential is successfully exploited. It can provide significant and valuable supplementary benefits to a locality dependent upon another primary employment base.

d) Recreation provides opportunities for investment of personal resources or the capitalization of rising land values, e.g. farm land or low-grade commercial land upgraded to more intensive uses.

e) Recreation facilities developed by the private sector enriches the tax base and augments tax revenues. Development increases the demands for public facilities, such as roads, water supply, and sewerage, but not for education.

f) In areas within reach of metropolitan areas, recreational development may stimulate construction of second homes for vacation, or retirement use providing a flow of income originating outside the area.

11. Robert R. Nathan Assoc., Inc., Resource Planning Associates "Recreation as an Industry", prepared for the Appalachian Regional Commission, Washington, D.C., December, 1966.

Case studies of 9 communities that have a dominant recreation economic base.

a) Seasonal tourist labour force tends to be women and students predominantly with men having permanent positions in other industries.

b) Income from tourism is generally low. Wages received from recreational employment generally supplement the main income of the family. These additional funds raise the total family income and standard of living.

c) Cottage owners alone often effectively resist encroachments by certain commercial recreation development and protect the attraction quality of the basic resource.

APPENDIX C

RECREATIONAL COMMUNITY DEVELOPMENT ELSEWHERE

Recently developed or expanded communities oriented to tourist and recreational markets were studied to analyze common patterns of planning and operations. A representative list of these communities was obtained through discussions with travel agents in the Toronto area and tourist information officers from several states. The characteristics of selected communities are shown on Table B-1. Typically, all areas mentioned were being marketed and descriptive literature about the scope, facilities and amenities was available.

The development programmes cf the communities were similar. A major investment is made in recreation facilities and municipal services through either new development or the purchase or capitalization of an existing centre. Land in the community is then either leased or sold for the development of housing and complimentary commercial enterprises. The sale or lease of land provides for a speedier recovery of capital and an increased cash flow.

All of the projects involved substantial capital investments prior to any income from either operating revenues or sale or rental of building lots. The difficulty in obtaining mortgages for recreation enterprises has affected the the number of projects begun and the speed of development. The shortage of financing has also tended to create need for quick recovery of capital through sale of land.

The new recreation community development is attributed to a combination of the following factors:

1. The tremendous increase in popularity of skiing, particularly as a family sport.

2. New developments in transportation: commercial airplane and private automobile.

3. Increasing disposable income combined with more leisure time.

4. There has been a change in demand to include facilities for recreation and social activities in the communities which has not existed since the end of World War II.

5. To enjoy participating in recreation activities in a leisurely manner without the pressure of crowds, etc., it is necessary to get away from the metropolitan area.

TABLE C-1 SURVEY OF PRIVATELY DEVELOPED OR EXPANDED YEAR-ROUND RECREATION COMMUNITIES IN THE U.S. AND CANADA

	Sugar Loaf, Mich.	Killington, Vmt.	Bromley, Vmt.	Dorset, Vmt.	Falcon Lake, Man.	Talisman, Ont.	Hidden Valley, Ont.	Kohalacoast, Hawaii	Sea Pines, S.C.	Tan-Tar-A, Mo.	Hound Ears, N.C.
Winter Activities											
Skiing	x	x	x	x	x	x	x	–	–	x	x
Swimming	–	–	x	x	–	x	x	–	–	–	x
Summer Activities											
Golf	x	x	x	x	x	x	x	x	x	x	x
Swimming - Pool	x	x	x	x	–	x	x	–	x	x	x
- Lake	x	–	–	–	x	–	x	x	x	x	x
Boating - Marina	x	–	–	–	x	–	x	x	x	x	–
Fishing	x	x	–	x	x	x	–	x	x	x	x
Org. Sports - Tennis etc.	x	x	–	x	x	x	x	x	x	x	x
Central Facility											
Shopping Centre	x	x	–	x	x	–	–	x	x	–	x
Accommodations	x	x	x	x	x	x	x	x	x	x	x
Restaurant - Bar	x	x	x	x	x	x	x	x	x	x	x
Convention Centre	–	–	x	–	–	–	x	–	–	–	x
Residential Development											
Multiple Housing	–	–	x	x	–	–	–	x	x	–	–
Single Housing	x	x	x	x	x	x	x	x	x	x	x
Local Attractions											
Recreation Areas - Parks, etc.	x	x	x	x	x	x	x	x	x	x	x
Historic sites	x	x	x	x	–	x	–	x	x	–	x
Access											
Within 150 miles of a metro area	–	–	–	x	x	x	x	–	–	x	x
Freeway	x	x	x	x	–	–	x	x	x	x	x
Airport	x	x	–	–	–	–	–	–	x	–	x

SOURCE: P.P.A.L. Surveys and files.

Table C-1 shows certain common characteristics among recently developed Canadian and American recreation communities, namely:

1. Sale or lease of land for cottages and other residential uses. Privately developed centres generally include hotel-type accommodations, restaurants and retail commercial facilities.

2. All communities are used year-round and have specially developed facilities and programmes oriented to each season.

3. Where skiing is possible in winter all the communities are focussed around this sport.

4. All centres include golf courses and most have year-round swimming pools.

5. Most communities are near National, State or Provincial Parks, historic sites and cultural institutions.

6. The Canadian centres are located within 2 hours drive of a major metropolitan centre. American centres are all more than 2 hours drive from metropolitan areas. Day-use facilities have not been developed to any extent in either country.

Other information which was not suitable for Table C-1, but which is of interest, is as follows:

1. The smallest development scheme for which information was available covered 1,500 or more acres of land.

2. Planned residential areas are in excess of 200 units of all types.

3. Costs of residential lots ranged between a low of $2,100 to $50,000. The median cost is just over $3,500.

4. House lot sizes ranged between 1/3 to 1 acre.

5. Lots are generally served by underground wiring for electricity and telephone with water supply and sewerage plants serving the central facility only. In the case of Canadian communities many of the lots are served by a central water supply and in some cases a sewerage system. In Ontario, pollution control legislation will require that new developments offer complete sewer and water systems.

6. The private developments in the U.S. generally include strict design control of all landscaping and architecture.

7. In most American communities the developer-operator will contract with the owners of private homes and apartments to rent them during periods when the owner is absent.

8. Recreation communities being built in developing countries such as in the Caribbean (not discussed in Table B-1) offer tax privileges and other forms of incentives.

Examples of recreational development at the national and regional planning level are underway in Europe. The Languedoc-Roussillon Region in France and the Porto Cervo development of the north-east Costa Smerelda on the Island of Sardinia are two important examples. In both cases the governments have recognized the value of recreation as a source of foreign exchange and as a basis for regional development.

LANGUEDOC-ROUSSILLON REGION *

The Region, consisting of four Departments: Gard, Herault, Aude and Pyrenees Orientales and its sea coast, will contain six new "Tourist Stations" of La Grande Motte, Le Cap D'Agde, Embouchure de L'Aude, Gruissan, Lecaute-Bacares and St. Cyprien. The Region runs for 120 miles south-west from La Grande Motte to the Spanish frontier.

The total population at the last Census was approximately 1.7 million. The total land area is 27,447 square kms. and the population density is 57.0 per square km.

The principal cities are Montpellier with a metro population of 251,759; Perpignan, 86,156; Beziers, 75,541; and Nimes, 105,199.

The Region's topography includes valleys and mountains, a broad coastal belt, beaches, inland lakes, etc. Three major airports capable of handling modern jets are located at Perpignan (Llabanere), Nimes (Garons) and Montpellier (Frejorgues). There are many smaller airports in the Region that are supported by private "Aero Clubs".

Main highways into the Region include the proposed autoroute from Nimes to Carcassonne, which will tie into the national autoroute system on completion. Secondary roads are good.

Background to the Development Plan

In 1959 the French Government commissioned economists and planners in the private and public sectors to investigate the long-range potential of the Region bearing in mind the then present dependence on the wine industry, shortage of natural resources to back industry, and the under-development of tourism.

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* SOURCE: Monaco: Tourist Industries France, Italy, Spain, a special study, Project Planning Associates International Limited, Toronto, April, 1969.

The study required:

(a) Secrecy because of a prior decision to make tourism a long-range development project.

(b) Possible large-scale irrigation programmes to diversify agriculture, to reduce dependence on wine making. This proposal ran contrary to traditional thinking in rural areas. (Five years after the first irrigation scheme the Region was producing one-third of the total apricot crop in France and had created a new industry -- preserves and other fruit products.)

(c) Establishment of a regional master plan that would encourage growth at a high standard of development specially on the coast between Montpellier and the Spanish frontier.

The planners' solution was unique and is resulting in perhaps the most imaginative and ambitious tourist-oriented development undertaken by any Government agency anywhere in the world.

Master Plan for Languedoc-Roussillon

The six new Tourist Stations to be created along the 120-mile Mediterranean coast within the Region are expected to reach a resident population of 100,000 by 1975.

The plan recommended that future growth along the coast should be a balance of private houses, apartments, hotels, holiday/vacation villages, camping and trailer grounds, sports facilities and commercial.

In 1963 the French Government agency -- Mission Interministerielle pour L'Amenagement Touristique de Littoral Languedoc-Roussillon (MITLR) -- began to quietly purchase land throughout the Region at prevailing low agricultural prices. By 1964 some 9,000 acres had been acquired by MITLR and speculation on remaining land planned for the Region blocked by legislation forcing present owners to give the Mission first refusal on all sites. In the event of the price demanded were too high, compulsory purchase powers became effective at rates prevailing two years before the purchase date.

The Administration of the Region, from land acquisition to finished projects, is three-tiered:

MITLR is involved in the acquisition and purchase of all land in the Region. They are responsible for the provision of municipal services -- auto routes, access roads, yacht basins and marinas, reforestation and landscaping including the creation of greenbelt reserves between the six stations.

The French Government through MITLR has allocated funds at the rate of $12 million a year for ten years to construct public works.

Four non-profit corporations have been formed to market serviced land. Their function is to improve, according to the circumstances, the serviced land for which they act as brokers at cost plus 2 per cent to 3 per cent for administration.

The final tier in land development is that of the private investor. Land is purchased from this corporation under very strict provisions:

(i) All private purchasers must conform to the Master Plan.

(ii) The purchaser is obliged to develop the land within three years. If not, it then reverts to the corporation.

(iii) Upon completion of development, the purchaser is free to sell the property on the commercial market.

The private sector is encouraged to invest. Serviced land is provided at cost plus a maximum of 3 per cent. Special concessions are made to hotel developments through state-lending agreements.

Private Sector Investment (June, 1968)

(All investments in New Franks)

West Germany: 21.5 million; Britain: 20.5 million (including investments by the Newton Group of Fr. 7.5 million); Belgium: 21.5 million plus an indeterminate sum of greater total value by French investors including large insurance companies and trusts mainly in vacation villages.

Progress

(a) La Grande Motte:

By June 1969 this station will have 22,000 new beds. Average area of apartments is 75 square meters. The entire development -- hotels, apartments, houses, vacation villages, etc. -- will cover 20,000 hectares. Land prices start at Fr. 100 a square meter (for hotels) which have a preference. The present cost per hotel room (without furnishings) is Fr. 2000 for prime water sites. Private houses start at Fr. 50 a square meter (inland). Camp and Trailer Sites operated by private enterprise are Fr. 178 square meter. Vacation Villages (which will either be

operated by the corporations or insurance/trust companies) is Fr. 27 square meter; this relatively low land cost being predicated on charges referred to later.

Port Area covers 13 hectares and will accommodate a minimum of 1,000 small vessels. All berths are on weekly/monthly/annual rental. Provision has been made inland for 18-hole golf course.

(b) Cap D'Agde:

Main services now going in together with road improvements. Creation of seawater inland lake necessitates dredging of 2.3 million cubic meters of land on foreshore. The area is volcanic. General development except for golf course will follow that of La Grande Motte -- hotels, apartments, private houses, vacation villages and supporting services.

(c) Embouchare de L'Aude:

Low priority area or station (it is the smallest of the six units in land area. Planning here emphasizes local urban residential populations, existing port and planned inland sea/sailing facilities. Main services construction started in 1968.

(d) Gruissan:

Surrounded by villages located on hills where land values are expected to increase by 1972, encouraging present occupants to sell to private enterprise, making way for revenue-producing developments. Ideal for hotels, apartments, and/or better type private housing. This station will provide 45,000 more beds after 1972. A dredging programme of similar magnitude to that planned for Cap D'Agde was started in 1968.

(e) Lido de Lecaute-Bacares:

First stage provided 20,000 new beds. Eventual target (1972) is 75,000 beds. Houses, three bedroom plus living room, etc. currently available at Fr. 62,000 maximum. Apartments on two-storey stack principle with one- or two-bedroom units at ground level and larger houses built over them. This is a private enterprise venture. Servicing loans at 8 to 9 per cent per annum. Yacht Harbours (sea and inland) will accommodate 5,000 small vessels.

(f) Saint Cyprien:

With La Grande Motte, this is the largest of the six stations and is being provided with service roads and flyovers to connect sea and inland-oriented facilities. This station will provide 24,000 new beds of which 12,500 are now available (Perpignan included).

Priorities

Although the entire six station projects have been advanced by two/three years, due mainly because of the tremendous interest in the private sector, the following priorities still apply:

1st Priority:	La Grande Motte-Carnon; Lecaute-Bacares;
2nd Priority:	St. Cyprien/Balaruc les Bains;
Non-Priority:	Gruissan; Agde; Embouchure de L'Aude.

Vacation Villages

Each of the six stations will have at least one vacation village concentration. The village nearly completed in La Grande Motte is immediately adjacent to a 160-acre inland lake (a marsh which has been dredged to a depth of 15 feet minimum with access to the Mediterranean). The village provides 1,800 beds total or four, five or six beds per vacation villa. These essentially are basic accommodation with small patio, kitchenette, bath and two- or three-bedrooms.

These units rent at Fr. 24.00 a day. This very low rental reflects the French Government's determination to bring prices down to a realistic minimum for lower income groups. At six persons per villa this works out (effective 1969) to Fr. 4.00 a head -- or less than a dollar per person per day.

Each concentration will have communal dining facilities, and stores at which prices will be controlled, making other expenses comparable with the costs of basic accommodation.

Table B-2 shows the existing attractions found in the principal city in this region:

TABLE C-2 EXISTING FACILITIES AND AMENITIES

	Winter Sports	Theatres	University	Gardens	Interesting Environs	Thermal Spa	Churches/Cathedral	Museums	Ruins	Festivals	Car Rental	Post Office	Swimming Pool	Camping
Arles	-	-	-	x	x	x	x	x	x	x	x	x	x	x
Nimes	-	-	x	x	x	-	x	x	x	x	x	x	-	x
Montpellier	x	x	x	x	x	x	x	x	x	x	x	x	-	x
Beziers	-	-	x	x	-	x	x	x	x	x	x	x	-	x
Narbonne	-	-	x	x	-	x	x	x	x	x	x	x	-	x
Perpignam	x	x	-	x	x	-	x	x	x	x	x	x	-	x

SOURCE: Guide Michelin - 1968
Guide Bleu - 1968

All of the foregoing information was compiled by the information provided by:

French Government Resident Representatives
The London Financial Times, Saturday, March 2, 1968
Personal three-day visit to Region by French Government Representative M.R. Landry, Mr. T. Tait, Assistant Commercial Secretary, Canadian Government and Mr. T.W. Pogson, Representative of the Consultants, Project Planning Associates Limited

SARDINIA - PORTO CERVO *

In 1963 the Costa Smerelda Consortium, a private enterprise venture headed by H.H. The Aga Khan was formed. The site, equal in area to Bermuda with 35 miles of coastline, designated a Tourist Development Zone by the Italian Government, and a close partnership entered into between the developers and the federal authorities. It was agreed between both parties that the development of the Costa Smerelda would be long-term, that the end product would become something of which the Sardinians, the Italians and the consortium could be proud.

Although this development has served as a spur to development elsewhere in the island there is little doubt that the project remains the largest, best planned, the most imaginative, and the soundest financially in Sardinia.

When finished in the early 1970's this section of the coast will support a permanent resident and the working population of several thousands. Development will consist of hotels, villas, apartment houses and supporting amenities like marinas, golf courses, tennis, etc., which have been planned to blend in with the great natural beauty of the coastline and countryside.

The consortium is responsible for zoning, planning, landscape maintenance of the finished units. Stringent conditions are applied to all purchasers; plans for all development -- private residences, hotels, shops and so forth, are first approved by the consortium. Applicants offering large sums of money have been refused; the plots being finally sold for a lesser price to clients prepared to comply with design control conditions.

Porto Cervo, Costa Smerelda is a tourist and commercial undertaking of a turn-key nature where every possible situation for the purchaser has been considered. Basic services are nearly completed at a cost to the Italian federal government of more than $20 million. The private consortium has already expended $10 million and calculates it has a further $10 million to spend before the project is complete.

Lease arrangements where the agent handles the property is becoming a very important consortium service turning privately owned houses into revenue-producing units at times when these houses are not occupied by the owner.

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* SOURCE: Monaco: Tourist Industries France, Italy, Spain, Project Planning Associates International Limited, Toronto, April, 1969.

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